



OGE-278 Wizard

Financial Executive Branch Personnel Public Disclosure Report

User Guide

February 2011 - Version 8.0

U.S. Department of State
A collaboration between:
Financial Disclosure Division and Office of Executive Director (L/EX)

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Chapter 1 Introduction

What is the OGE-278 Financial Disclosure Form?

The OGE-278 is a standard Office of Government Ethics (OGE) form used to document a person's outside affiliations and financial interests to determine if a conflict of interest exists with the individual's official duties. The Ethics in Government Act, as amended, requires certain individuals serving in senior or other designated positions in the United States Government to submit a full and complete accounting of their affiliations and financial interests. This is a Federal Government mandate to promote public trust and financial interests. The e-Forms OGE-278 Wizard has the goal of providing an easier method for OGE-278 filers to complete the form.

Form Options

You have three options for completing the form, they are as follows:

1. The OGE-278 Wizard is accessible on the Ethics and Political Activities Website (intranet)
2. The OGE-278 Wizard and the OGE-278 HTML Form format are accessible on the internet
3. The OGE-278 Form in FAR (e-Forms) is accessible on OpenNet

The OGE-278 Wizard

The OGE-278 Wizard is a step-by-step format placed over the e-Forms OGE-278 form. It provides a more organized method of completing this complex form by displaying the information in a logical manner. Additionally, the design of the OGE-278 Wizard incorporates standard business rules that restrict or allow a particular function based on pre-defined instructions.

The Actual OGE-278 Form in HTML and FAR Formats

Both the HTML and FAR versions of the form graphically show the actual form as it will look when printed.

Note: This guide covers how to systematically access, save, print and navigate through the process of completing the OGE-278 using the OGE-278 Wizard.

Who Needs to File?

The Ethics in Government Act of 1978, as amended, requires senior officials in the executive, legislative, and judicial branches to file public reports of their finances and other interests outside the Government. At the Department of State, individuals required to file include all employees appointed to an Executive Schedule position, all members of the Senior Executive Service, all members of the Senior Foreign Service, all Schedule C employees, and any limited non-career appointee in the Foreign Service who is a political appointee.

Who you can contact for questions and assistance?

Sarah E. Taylor, Chief, Financial Disclosure Division

L/Ethics/FD

2401 E Street NW

SA-1, Room H-228

Washington, DC 20520

Tel: (202) 663-3122

Fax: (202) 663-3339

Email: Taylorse2@state.gov

Or

Contact the L/Ethics front desk by dialing 202-663-3770

Email: L-Ethics-FD Financial Staff@state.gov

Chapter 2 Getting Started

This chapter discusses basic procedures used throughout the OGE-278 Wizard. It provides instructions on how to log in and navigate.

Introduction

The Department of State employees can access the OGE-278 Wizard by typing in the following URL: <http://SF278wizard.state.gov>


Before you get started, the following is information you should know:


- References made to the OGE-278 are applicable to any saved SF 278 in the Wizard. The SF-278 was re-designated as the OGE-278 by the Office of Government Ethics January 2011.
- All previously saved SF-278 reports in the Wizard can be accessed by using the OGE-278 Wizard.
- The amount of data you can enter into the OGE-278 Wizard equals the amount of data accepted in the OGE version of the OGE-278 form
- The OGE-278 Wizard has drop down buttons that provide a list of pre-selected choices or you have the ability to type the information
- You can save your data *locally* from any screen that has the **Save** button located at the bottom of each screen. Remember to **save frequently** as discussed in Chapter 8
- In this document, the term “actual form” is referring to the form generated in Print Preview

Page Navigation

As you are completing the OGE-278, you will need to navigate through the many screens. Table 2.1 describes how to navigate in the OGE-278 Wizard.

Table 2.1 Navigation Symbols

Navigation Symbol	Description
Close	The Close button allows you to exit the Wizard. You will receive a warning to save your data before closing.
	The Help icon is located on various screens in the OGE-278 Wizard. By clicking on it you will receive additional information about the specific item.

Navigation Symbol	Description
 Business Rule:	The OGE-278 Wizard has standard business rules and guidelines that control fields that are restricted or allowed based on your selections. This business rule icon appears throughout this guide to alert you to the business rule as it applies to a specific screen.
[Next]	The Next button takes you from the current screen to another screen based on the OGE-278 business rule.
[Back]	The Back button takes you to the previous screen.
[Find]	The Find button allows you to randomly search and find a line item in each of the schedules.
[Save]	The Save button saves the data entered. Warning: The System does not automatically save your data, you must click Save . (See Chapter 8)
[Print Preview]	The Print Preview button displays the original OGE-278 form. If you have entered data in the OGE-278 Wizard, it will appear in the print preview of the OGE-278 form. Print Preview will take you to the first page of the actual OGE-278 form. For more details on printing. (See Chapter 9)
[Add Another]	The Add Another button allows you to add a new line item in each of the schedules.
[Delete]	The Delete button allows you to delete the selected line item in each of the schedules.
Privacy Act	Click on the Privacy Act button to view the Privacy Act information.

Logging In

This section explains how to log in to the OGE-278 Wizard. You need to log in each time you access the OGE-278 Wizard.

To access:

Steps:

1. Open an internet browser, for example Internet Explorer. In the **Address** box, type in the following web address: <http://SF278wizard.state.gov> or click this dynamic link (Figure 2.1).

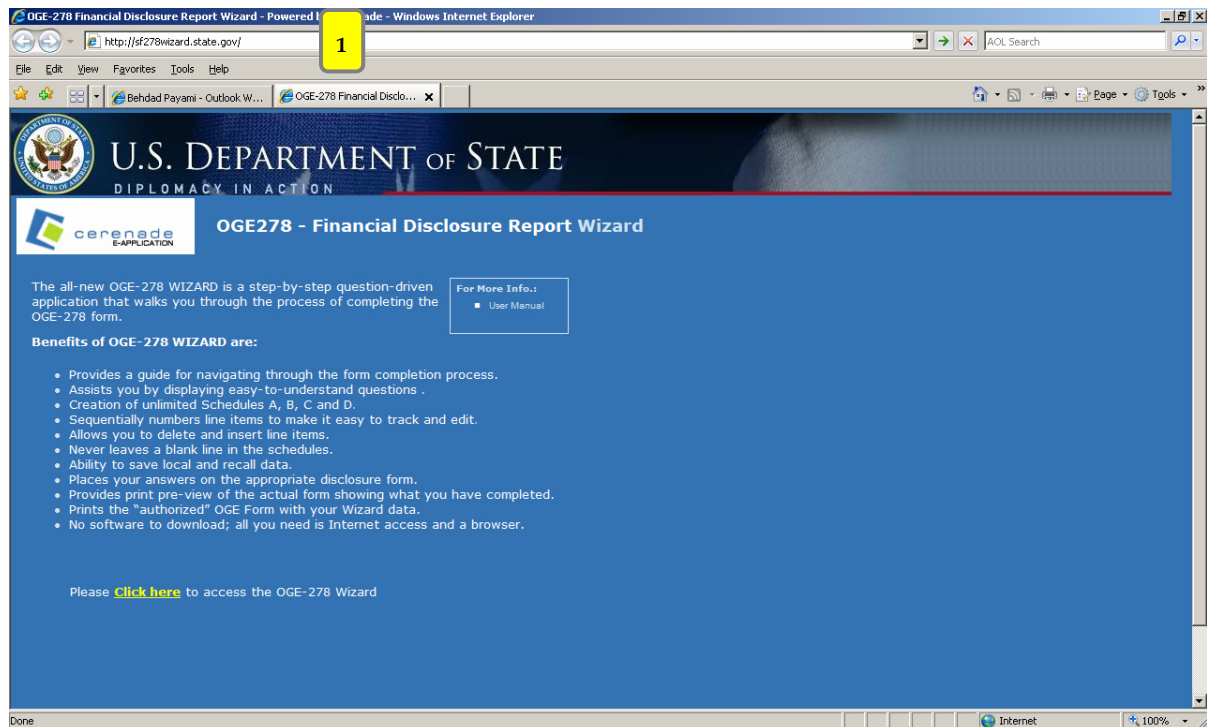


Figure 2.1

2. You will go to the OGE-278 web page. Click on the [Click Here](#) link under US Department of State and USAID employees as seen below (Figure 2.2).

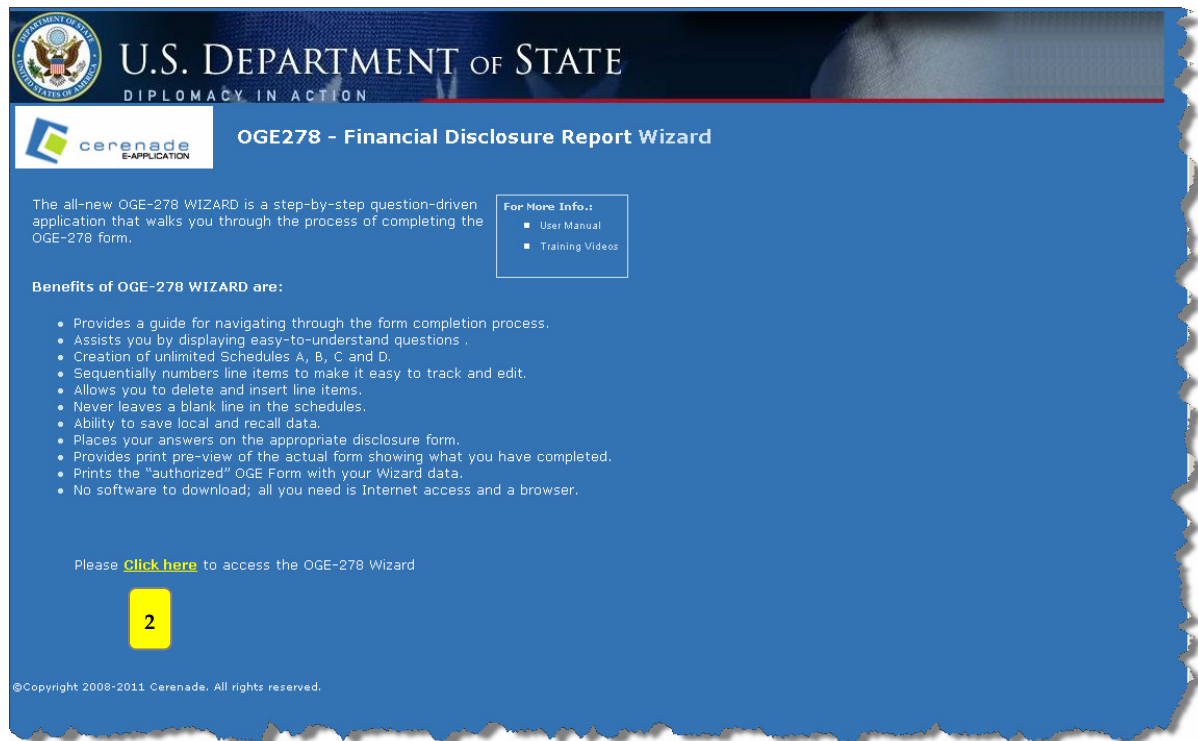


Figure 2.2

Once you have successfully logged in, the OGE-278 Wizard opens to the **Guide** and you will be able to complete each part of the OGE-278.

The OGE-278 Instructions

As soon as you start the OGE-278 Wizard you are presented with a set of instructions.

Steps:

1. Read the instructions and click **Continue**.

The screenshot shows a web application window titled "OGE-278 Executive Branch Personnel Public Financial". In the top right corner, it displays "Form Approved OMB No. 3209-0001" and the website "www.cerenade.com". The main content area is titled "INSTRUCTIONS" and contains two links: "[Who Must File a Financial Disclosure Report?](#)" and "[What is 'Public Financial Disclosure'?](#)". At the bottom left is a "CLOSE" button. At the bottom right is a yellow box with the number "1" next to a "[Continue]" button. A progress bar is visible above the "Continue" button.

The OGE-278 Wizard Guide

Steps:

1. The **Guide** is located on the left side of the OGE-278 Wizard and can be accessed on every page of the OGE-278 Wizard (Figure 2.3). The **Guide** is your table of contents for the OGE-278 Wizard. If you need to go to a specific section of the report, you may do so by clicking on the selected section from the **Guide**.

The **Guide** allows you to see where you are in the OGE-278 completion process by highlighting the section in the color blue.

To begin using the OGE-278 Wizard:

2. After you read the information on the initial **Guide** screen, Select **OGE-278 Wizard** or click on the section to which you want to go.

OGE-278 Executive Branch Personnel Public Financial Form Approved OMB No. 3209-0001 www.cerenade.com

Guide

Personal

Schedule A

Schedule B I

Schedule B II

Schedule C I

Schedule C II

Schedule D I

Schedule D II

Submit

CLOSE

Procedures

The Ethics Office provides guidance to bureau and post Management Offices to permit those offices to (1) identify employees (and candidates for employment) who serve in or will serve in public filer positions and (2) give to each filer the prescribed written instructions and a blank form to ensure timely filing. The instructions include information about when to file, where to file, penalties (possibly to include a late filing fee), and how to access an electronic version of the OGE-278.

The Ethics Office distributes guidance concerning annual reports prior to each annual filing cycle, including having the updated guidance and related materials available on the Department of State Ethics intranet website (www.ethics.state.gov).

Select your preference

Input data via Interview-driven **OGE-278 Wizard** Input data directly on to the form **OGE-278 Form**

To complete the OGE-278 on-line please note the following requirements:

- Your Internet browser must support 128-bit encryption and must have javascript enabled.
- If you are using Internet Explorer (Windows), the minimum version that will work with this site is version 5.0, with service pack 2.
- If you are using Netscape, the minimum version that will work with this site is version 6.2.

Note: Depending on the speed of your Internet connection, the time to download each page may vary. Please be patient.

[Back]

Figure 2.3

3. After you select the **OGE-278 Wizard**, you have three options on this screen (Figure 2.):

- Select **OGE-278 Wizard** if you have no data to import
- Select **Import Data** to upload your existing data from a saved OGE-278. (See **Chapter 10**)
- Select **Get Answers** if you need help with completing the form or select **Privacy Act Statement** to get the Privacy Act information

OGE-278 Executive Branch Personnel Public Financial

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Guide

- Personal
- Schedule A
- Schedule B I
- Schedule B II
- Schedule C I
- Schedule C II
- Schedule D I
- Schedule D II

Submit

CLOSE

OGE-278 Wizard
Use this option if you have not started the OGE-278 Wizard

Import Data
Use this option to upload your existing data from a saved OGE-278

Get Answers
Help on this Form
Privacy Act Statement

Getting Started with OGE-278
This site permits filers to complete the OGE-278 without any accounts. Partially completed data will be stored on your local computer. If you need to quit before you have completed the application, please click the "Save" button and save the data to your local computer.

New Application / Import Data
Begin a new OGE-278 Wizard or import data that you previously saved during a prior session.

Comments, Questions?
Please send your comments or questions to Sarah Taylor at TaylorSE2@state.gov

Figure 2.4

The details to complete each section are in the following chapters.

Chapter 3 Personal

This section will discuss completing the **Personal** section of the OGE-278 Wizard found on page 1 of the actual form.

Reporting Status Section

Once you select the OGE-278 Wizard, you will begin entering your information in the **Reporting Status Section** (Figure 3.1).

To complete the **Reporting Status Section**:

Steps:

1. Type your date of appointment or candidacy
2. Select your reporting status. You may choose from either:
 - Incumbent
 - New Entrant, Nominee, or Candidate
 - Termination Filer



Business Rule: You can select both Incumbent and Incumbent Date AND Termination filer and Termination date if needed. If Incumbent and Incumbent Date OR Termination filer and Termination Date are selected, selecting New Entrant will remove the Incumbent and Termination Filer information.



Business Rule: If you select New Entrant or Nominee as the reporting status, the Wizard will automatically populate **None** in **Schedule B, Part I – Transactions and Part II: Gifts, Reimbursements, or Travel Expenses**.

3. After you have selected the appropriate reporting status and typed the additional applicable data, click **Next**. You will go to the **Reporting Individual Section**.

Reporting Status Section

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Guide

Personal

Schedule A

Schedule B I

Schedule B II

Schedule C I

Schedule C II

Schedule D I

Schedule D II

Submit

CLOSE

Date of Appointment, Candidacy, Election, or Nomination (Month, Day, Year) ? Late filing fee

February 11, 2009 1 Enter Date as: October 12, 2010

Reporting Status (Check Appropriate Boxes) ?

Incumbent ☒

Calendar Year Covered by Report
2010

New Entrant, Nominee, or Candidate ☐

Termination Filer ☐

Termination Date (If Applicable) (Month, Day, Year)

2

3

[Save] [Print Preview]

[Back] [Next]

Figure 3.1

Helpful Hint: Remember to save your data often by clicking SAVE. (See Chapter 8)

Page 11

Reporting Individual Section

To complete the **Reporting Individual Section**:

Steps:

4. Type your last name (Figure 3.2).
5. Type your first name.
6. Type your middle initial.
7. Type the complete address for your present office.
8. Type the telephone number including the area code.
9. Select your position from the **Title of Position** drop down list or type in your own.
10. Click **Next**. You will continue to the **Prior Positions Section**.

The screenshot shows the 'Reporting Individual Section' of a web form. The form is titled 'Reporting Individual Section' in a blue header. On the right side of the header, it says 'Form Approved OMB No. 3209-006' and 'www.cerenade.com'. On the left side, there is a sidebar with a 'Guide' section containing links to 'Personal', 'Schedule A', 'Schedule B I', 'Schedule B II', 'Schedule C I', 'Schedule C II', 'Schedule D I', and 'Schedule D II'. The 'Personal' link is highlighted. Below the sidebar are 'Submit' and 'CLOSE' buttons. The main form area contains several sections: 'Reporting Individual's Name' with fields for 'Last Name' (Doe), 'First Name' (Jane), and 'Middle Initial' (J); 'Location of Present Office (or forwarding address)' with fields for 'Address' (555 Main Street, Washington, DC 23000) and 'Telephone No.' (202-555-5555); 'Position for Which Filing' with a 'Title of Position' dropdown menu (Secretary) and a text input field (Secretary); and 'Department or Agency (If Applicable)' with a text input field (U.S. Department of State). At the bottom, there are buttons for '[Save]', '[Print Preview]', '[Back]', and '[Next]'. Numbered callouts 4 through 10 are placed over the form fields to indicate the steps: 4 points to the Last Name field, 5 to the First Name field, 6 to the Middle Initial field, 7 to the Address field, 8 to the Telephone No. field, 9 to the Title of Position dropdown menu, and 10 to the Next button.

Figure 3.2

Prior Positions Section

To complete the **Prior Positions Section**:

Steps:

- 11.** If you have held an additional position(s) with the Federal Government during the preceding 12 months, type the title of the position and date held (Figure 3.3).
- 12.** Select the name of the Senate Committee considering your nomination from the drop down list or you can type your own committee in. (See Business Rule below)



Business Rule: If you are an Incumbent or Termination Filer, this field will be locked. However, if you are New Entrant, the Wizard will automatically populate *Senate Foreign Relations Committee*, with the option to remove it.

- 13.** If you intend to create a Qualified Diversified Trust, select **Yes**. Otherwise, select **No**.
- 14.** Click **Next**. You will continue to **Comments of Reviewing Officials**.

Figure 3.3

Comments of Reviewing Officials

Only reviewing officials should complete the comments section. With the exception that if the filer has been granted an extension, then the filer completes the **Filing extension is granted** check box and completes the **Indicate number of days** text box.

To complete the **Comments of Reviewing Officials**:

Steps:

- 15.** If the filer has been granted an extension, select the filing extension check box (Figure 3.4).
- 16.** Type the number of days the extension has been granted.
- 17.** Type your comments.
- 18.** Click **Next**. You will continue to **Schedule A – Assets and Income**.

The screenshot shows the "Prior Positions Section" of the OGE-278 Wizard. The sidebar on the left contains a "Guide" section with links to "Personal", "Schedule A", "Schedule B I", "Schedule B II", "Schedule C I", "Schedule C II", "Schedule D I", and "Schedule D II". Below these are "Submit" and "CLOSE" buttons. The main content area has a header "Prior Positions Section" and a sub-header "Form Approved OMB No. 3209-000 www.cerenade.com". The form is divided into three main sections:

- Position(s) Held with the Federal Government During the Preceding 12 Months (If Not Same as Above)**: This section contains a text box for "Title of Position(s) and Date(s) Held (2 lines of text only)". Callout 15 points to the text box, and callout 16 points to the date field.
- Potential Nominees Subject to Senate Confirmation**: This section contains a dropdown menu for "Name of Congressional Committee Considering Nomination" with "Not Applicable" selected. Callout 17 points to the dropdown menu.
- Do You Intend to Create a Qualified Diversified Trust?**: This section contains two radio buttons, "Yes" and "No". Callout 18 points to the "Yes" radio button.

At the bottom of the form, there are buttons for "[Save]", "[Print Preview]", "[Back]", and "[Next]".

Figure 3.4

Chapter 4 Schedule A

This chapter will discuss completing Schedule A in the OGE-278 Wizard.

Schedule A - Assets and Income

Steps:

1. Click **None** if you have no assets to report in **Schedule A**. Then select **Next** and you will continue to **Schedule B**.
2. If you have items to report in Schedule A, click **Next** (Figure 4.1).

Schedule A - Assets and Income

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Guide
Personal
Schedule A
Schedule B I
Schedule B II
Schedule C I
Schedule C II
Schedule D I
Schedule D II
Submit
CLOSE

For you, your spouse, and dependent children, report each asset held for investment or the production of income which had a fair market value exceeding \$1,000 at the close of the reporting period, or which generated more than \$200 in income during the reporting period, together with such income.

For yourself, also report the source and actual amount of earned income exceeding \$200 (other than from the U.S. Government). For your spouse, report the source but not the amount of earned income of more than \$1,000 (except report the actual amount of any honoraria over \$200 of your spouse).

Exclude for yourself and spouse income from employment by the United States Government and from any retirement system of the United States (including the Thrift Savings Plan) or from social security.

1 ☐ None

2 [Back] [Next]

[Save] [Print Preview]

Figure 4.1


To complete **Schedule A**:

Steps:

- 3.** For **Block A**, type each asset in detail. Only 2 lines of text only (Figure 4.2).

Note: Skip **Block B** and **Block C** if this is a Sub-category item.

- 4.** For **Block B**, select the valuation of the asset.

- 5.** If the asset is a mutual fund and meets the Excepted Investment Fund (EIF) criteria, see  for definition.



If you select EIF, do not select the **Type of Income**. If you do not select EIF, you must select the **Type of Income**.

- 6.** For **Block C**, select the income type associated with the asset. If the income type is not listed, select **Other Income** and specify the type and actual amount.

- 7.** Select the amount of income.

- 8.** If amount is associated with Honoraria, type the date.

- 9.** The **Add Another** button allows you to add a new line item in each of the schedules.

- 10.** The **Delete** button allows you to delete the selected line item in each of the schedules.

- 11.** When you have added all assets and income, click **Next**. You will continue to **Schedule B**.

- 12.** To randomly search, find and edit a line item, click the **Find** button.

Schedule A - Assets and Income

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Guide

Personal

Schedule A

Schedule B I

Schedule B II

Schedule C I

Schedule C II

Schedule D I

Schedule D II

Submit

CLOSE

Asset and Income (Block A) 1 OF 1

Description Fidelity Olympus Fund

Skip Blocks "B" and "C" if this is a Sub-Category Item.

Valuation of Assets (Block B)

<input type="radio"/> None (or Less than \$1,001)	<input type="radio"/> \$100,001 - \$250,000	<input type="radio"/> \$1,000,001 - \$5,000,000	<input type="radio"/> Excepted Investment Fund
<input type="radio"/> \$1,001 - \$15,000	<input checked="" type="radio"/> \$250,001 - \$500,000	<input type="radio"/> \$5,000,001 - \$25,000,000	<input type="radio"/> Excepted Trust
<input type="radio"/> \$15,001 - \$50,000	<input type="radio"/> \$500,001 - \$1,000,000	<input type="radio"/> \$25,000,001 - \$50,000,000	<input type="radio"/> Qualified Trust
<input type="radio"/> \$50,001 - \$100,000	<input type="radio"/> Over \$1,000,000*	<input type="radio"/> Over \$50,000,000	<input type="radio"/> Clear Above Selection

Income (Block C)

Type	Amount
<input type="checkbox"/> Dividends	<input type="radio"/> None (or less than \$201) <input type="radio"/> \$201 - \$1,000 <input type="radio"/> \$1,001 - \$2,500 <input type="radio"/> \$2,501 - \$5,000
<input type="checkbox"/> Rent and Royalties	<input type="radio"/> \$5,001 - \$15,000 <input type="radio"/> \$15,001 - \$50,000 <input type="radio"/> \$50,001 - \$100,000 <input type="radio"/> Over \$1,000,000*
<input type="checkbox"/> Interest	<input type="radio"/> \$15,001 - \$50,000 <input type="radio"/> \$50,001 - \$100,000 <input type="radio"/> Over \$5,000,000
<input checked="" type="checkbox"/> Capital Gains	<input checked="" type="radio"/> \$100,001 - \$1,000,000
<input type="checkbox"/> Other Income (Specify Type & Actual Amount)	<div style="display: flex; align-items: center;"> <div style="flex: 1;"> <input type="text"/> </div> <div style="flex: 1;"> Date Only if Honoraria (Mo., Day, Yr.) </div> </div>

* This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.

[Save]
[Print Preview]
[Add Another]
[Delete]
[Find]
[Back]
[Next]

Figure 4.2

Chapter 5 Schedule B

The chapter will discuss completing Schedule B: Part I and Part II in the OGE-278 Wizard.

Schedule B - Part I: Transactions

Steps:

1. If you select Incumbent or Termination Filer as the reporting status, you must select **None** if you have nothing to report. Then select **Next** and you will continue to **Schedule B: Part II**.

If you have transactions to report, select **Next** to continue to Schedule B: Part I.

2. If you select New Entrant or Nominee as the reporting status, the Wizard will automatically populate **None** in **Schedule B, Part I – Transactions and Part II: Gifts, Reimbursements or Travel Expenses**. Select **Next** (Figure 5.1).

Schedule B - Part I: Transactions

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ATTENTION -
Do not complete Schedule B if you are a new entrant, nominee, or Vice Presidential or Presidential Candidate.

Report any purchase, sale, or exchange by you, your spouse, or dependent children during the reporting period of any real property, stocks, bonds, commodity futures, and other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss.

Do not report a transaction involving property used solely as your personal residence, or a transaction solely between you, your spouse, or dependent child. Check the "Certificate of divestiture" block to indicate sales made pursuant to a certificate of divestiture from OGE.

1

☐ None

2

[Save] [Print Preview] [Back] [Next]

Figure 5.1

To complete **Schedule B – Part I: Transactions**:

Steps:

3. Type a description of your asset (Figure 5.3).
4. Type the date of the transaction (Mo, Day, Yr).
5. Choose the **Transaction Type**. Your choices are: **Purchase**, **Sale**, or **Exchange**.
6. Select the amount of the transaction.
7. The **Add Another** button allows you to add a new line item in each of the schedules.
8. The **Delete** button allows you to delete the selected line item in each of the schedules.
9. After you have added all transactions, click **Next**. You will continue to **Schedule B – Part II**.
10. To randomly search, find and edit a line item, click the **Find** button.

The screenshot shows the "Schedule B - Part I: Transactions" form. On the left is a navigation menu with links for Guide, Personal, Schedule A, Schedule B I (highlighted), Schedule B II, Schedule C I, Schedule C II, Schedule D I, and Schedule D II. Below the menu are "Submit" and "CLOSE" buttons. The main form area is titled "Identification of Assets (2 lines of text)" and "1 OF 1". It contains a text field for the asset description (labeled 3) with the value "Central Airlines Common" (labeled 5), a date field (labeled 4) with the value "2/1/99", a "Transaction Type" section (labeled 5) with radio buttons for "Purchase" (selected), "Sale", and "Exchange", and an "Amount of Transaction" section (labeled 6) with a grid of radio button categories. The selected category is "\$50,001 - \$100,000". A footnote explains the asterisk on the "Over \$1,000,000" category. At the bottom, a row of buttons is labeled: "Save" (labeled 7), "Print Preview" (labeled 8), "Add Another" (labeled 10), "Delete" (labeled 9), "Find" (labeled 10), "Back" (labeled 9), and "Next" (labeled 9).

Figure 5.2

Schedule B - Part II: Gifts, Reimbursements, and Travel Expenses

Steps:

- 11.** If you select Incumbent or Termination Filer as the reporting status, you must select **None** if you have nothing to report. Then select **Next** and you will continue to **Schedule C: Part I**.

If you have items to report in Schedule B: Part II, click **Next** (Figure 5.3)

- 12.** If you are a New Entrant or Nominee **Do Not** complete Schedule B, click **Next**.

Schedule B - Part II: Gifts, Reimbursements, and Travel Expenses

Form Approved
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www.cerenade.com

[Click here to see why the prices have changed below.](#) ?

Do not complete Schedule B if you are a new entrant, nominee, or Vice Presidential or Presidential Candidate.

For you, your spouse and dependent children, report the source, a brief description, and the value of:

(1) gifts (such as tangible items, transportation, lodging, food, or entertainment) received from one source totaling more than \$335, and

(2) travel-related cash reimbursements received from one source totaling more than \$335. For conflicts analysis, it is helpful to indicate a basis for receipt, such as personal friend, agency approval under 5 U.S.C. § 4111 or other statutory authority, etc. For travel-related gifts and reimbursements, include travel itinerary, dates, and the nature of expenses provided. Exclude anything given to you by the U.S. Government; given to your agency in connection with official travel; received from relatives; received by your spouse or dependent child totally independent of their relationship to you; or provided as personal hospitality at the donor's residence. Also, for purposes of aggregating gifts to determine the total value from one source, exclude items worth \$134 or less. See instructions for other exclusions.

11

☐ None

12

[Save] [Print Preview] [Back] [Next]

Figure 5.3

To complete **Schedule B – Part II: Gifts, Reimbursements, and Travel Expenses**:

Steps:

- 13.** Type the name and address of the source. Only 2 lines of text. (Figure 5.4)
- 14.** Type a brief description of the gift, reimbursement, or travel expense. Only 2 lines of text.
- 15.** Type the value of the item.
- 16.** The **Add Another** button allows you to add a new line item in each of the schedules.
- 17.** The **Delete** button allows you to delete the selected line item in each of the schedules.
- 18.** After you have added all the items, click **Next**. You will continue to **Schedule C**.
- 19.** To randomly search, find and edit a line item, click the **Find** button.

Schedule B - Part II: Gifts, Reimbursements, and Travel Expenses Form Approved OMB No. 3209-0001 www.cerenade.com

Identification of Gift, Reimbursement or Travel Expense 1 OF 1

Source (Name and Address) (Only 2 lines of text) **13**
Frank Jones, San Francisco, CA
(Personal Friend)

Brief Description (Only 2 lines of text) **14**
A Leather Briefcase

Value **15**
300.00

16 **17** **19** **18**

[Save] [Print Preview] [Add Another] [Delete] [Find] [Back] [Next]

Figure 5.4

Chapter 6 Schedule C

This chapter will discuss Schedule C: Part I and Part II of the OGE-278 Wizard.

Schedule C- Part I: Liabilities

Steps:

1. If you select Incumbent or Termination Filer as the reporting status, you must select **None** if you have nothing to report. Then select **Next** and you will continue to **Schedule C: Part II**.
2. If you have liabilities to report in **Schedule C: Part I**, click **Next** (Figure 6.1).

Schedule C - Part I: Liabilities Form Approved
OMB No. 3209-0001
www.cerenade.com

Guide
Personal
Schedule A
Schedule B I
Schedule B II
Schedule C I
Schedule C II
Schedule D I
Schedule D II
Submit
CLOSE

Report liabilities over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or dependent children. Check the highest amount owed during the reporting period.

Exclude a mortgage on your personal residence unless it is rented out; loans secured by automobiles, household furniture or appliances; and liabilities owed to certain relatives listed in instructions. See instructions for revolving charge accounts. ?

1
☐ None

2
[Save] [Print Preview] [Back] [Next]

Figure 6.1

To complete **Schedule C – Part I: Liabilities**:

Steps:

3. Type the name and address of your creditor. Only 2 lines of text (Figure 6.2).
4. Type a brief description of the liability. Only 2 lines of text.
5. Type the date the liability was incurred. For example, 2007.
6. Type the interest rate (if applicable).
7. Type the term (if applicable).
8. Select the category of amount or value.
9. The **Add Another** button allows you to add a new line item in each of the schedules.
10. The **Delete** button allows you to delete the selected line item in each of the schedules.
11. After you have added all liabilities, click **Next**.
12. To randomly search, find and edit a line item, click the **Find** button.

The screenshot shows the "Schedule C - Part I: Liabilities" form. The form is titled "Schedule C - Part I: Liabilities" and includes a sidebar with navigation links: Guide, Personal, Schedule A, Schedule B I, Schedule B II, Schedule C I (highlighted), Schedule C II, Schedule D I, and Schedule D II. The main form area is titled "Identification of Liability (Enter only two lines of text in Creditors and Type of Liability) 1 OF 1". It contains the following fields and buttons:

- Creditors (Name and Address):** A text box containing "First District Bank" and "Washington, DC". A yellow callout 3 points to this field.
- Type of Liability:** A text box containing "Mortgage on rental property, Delaware". A yellow callout 4 points to this field.
- Date incurred:** A text box containing "1991". A yellow callout 5 points to this field. Below it is an example "Example 2007".
- Interest Rate:** A text box containing "8.0". A yellow callout 6 points to this field.
- Term if applicable:** A text box containing "25". A yellow callout 7 points to this field.
- Category of Amount or Value:** A section with a grid of radio button options. A yellow callout 8 points to this section. The options are:

<input type="radio"/> \$10,001 - \$15,000	<input type="radio"/> \$100,001 - \$250,000	<input type="radio"/> Over \$1,000,000*	<input type="radio"/> \$25,000,001 - \$50,000,000
<input type="radio"/> \$15,001 - \$50,000	<input type="radio"/> \$250,001 - \$500,000	<input type="radio"/> \$1,000,001 - \$5,000,000	<input type="radio"/> Over \$50,000,000
<input checked="" type="radio"/> \$50,001 - \$100,000	<input type="radio"/> \$500,001 - \$1,000,000	<input type="radio"/> \$5,000,001 - \$25,000,000	
- Buttons:** At the bottom, there are buttons for [Save], [Print Preview], [Add Another], [Delete], [Find], [Back], and [Next]. A yellow callout 9 points to [Add Another], 10 to [Delete], 12 to [Find], and 11 to [Next].

At the top right of the form, it says "Form Approved OMB No. 3209-0001 www.cerenade.com".

Figure 6.2

Schedule C - Part II: Agreements or Arrangements

Steps:

- 13.** If you select Incumbent or Termination Filer as the reporting status, you must select **None** if you have nothing to report. Then select **Next** and you will continue to **Schedule D: Part I**.
- 14.** If you have Agreements or Arrangement to report in **Schedule C: Part II**, click **Next** (Figure 6.3).

Schedule C - Part II: Agreements or Arrangements

Form Approved
OMB No. 3209-0001
www.cerenade.com

Guide
Personal
Schedule A
Schedule B I
Schedule B II
Schedule C I
Schedule C II
Schedule D I
Schedule D II
Submit
CLOSE

Report your agreements or arrangements for:

- (1) continuing participation in an employee benefit plan (e.g. pension, 401k, deferred compensation);
- (2) continuation of payment by a former employer (including severance payments);
- (3) leaves of absence; and
- (4) future employment. See instructions regarding the reporting of negotiations for any of these arrangements or benefits. ?

13

☐ None

14

[Save] [Print Preview] [Back] [Next]

Figure 6.3

To complete **Schedule C – Part II: Agreements or Arrangements**:

Steps:

- 15.** Type the status and terms of any Agreement or Arrangement (Figure 6.4).
- 16.** Type the names of the parties involved in the Agreement or Arrangement.
- 17.** Type the date of the Agreement or Arrangement. For example: 7/85.
- 18.** The **Add Another** button allows you to add a new line item in each of the schedules.
- 19.** The **Delete** button allows you to delete the selected line item in each of the schedules.
- 20.** After you have added all Agreements or Arrangements, click **Next**. You will continue to **Schedule D: Part I**.
- 21.** To randomly search, find and edit a line item, click the **Find** button.

Schedule C - Part II: Agreements or Arrangements Form Approved,
OMB No. 3209-0001
www.cerenade.com

Identification of Agreement or Arrangement 1 OF 1

(Enter only two lines of text in the Status and Terms 15 parties fields)

Status and Terms of any Agreement or Arrangement

Pursuant to partnership agreement, will receive lump sum payment of capital amount & partnership share calculated on service performed through 2/1/2010

Parties 16

Doe Jones & Smith, Hometown, State

17 Date 7/2011 Example: 7/85

18
19
21
20

[Save] [Print Preview] [Add Another] [Delete] [Find] [Back] [Next]

Figure 6.4

Chapter 7 Schedule D

This chapter will discuss Schedule D: Part I and Part II of the OGE-278 Wizard.

Schedule D- Part I: Positions Held Outside of U.S. Government

Steps:

1. If you have no positions held outside of U.S. government to report in **Schedule D: Part I**, select **None**. Then click **Next** to continue to **Schedule D - Part II**.
2. If you have held positions outside the U.S. Government, select **Next** (Figure 7.1).

Schedule D - Part I: Positions Held Outside U.S. Government

Form Approved
OMB No. 3209-0001
www.cerenade.com

Guide
Personal
Schedule A
Schedule B I
Schedule B II
Schedule C I
Schedule C II
Schedule D I
Schedule D II
Submit
CLOSE

Report any positions held during the applicable reporting period, whether compensated or not. Positions include but are not limited to those of an officer, director, trustee, general partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise or any non-profit organization or educational institution. **Exclude** positions with religious, social, fraternal, or political entities and those solely of an honorary nature.

1

☐ None

2

[Save] [Print Preview] [Back] [Next]

Figure 7.1

To complete **Schedule D – Part I: Positions Held Outside U.S. Government:**

Steps:

- 3.** Type the **Organization (Name and Address)**. Only 2 lines of text (Figure 7.2).
- 4.** Type the **Type of Organization**. Only 2 lines of text.
- 5.** Type the **Position Held**. Only 2 lines of text.
- 6.** Type the date you started the position. For example: 6/92.
- 7.** Type the date the position ended.
- 8.** The **Add Another** button allows you to add a new line item in each of the schedules.
- 9.** The **Delete** button allows you to delete the selected line item in each of the schedules.
- 10.** After you have added all positions held outside the U.S. Government, click **Next**.
- 11.** To randomly search, find and edit a line item, click the **Find** button.

Schedule D - Part I: Positions Held Outside U.S. Government

Form Approved
OMB No. 3209-0001
www.cerenade.com

Identification of Position Held Outside U.S. Government 1 OF 1

(Enter only two lines of text in the Organization, Type of Organization and Position Held fields)

Organization (Name and Address)
National Association of Rock Collectors, NY.

Type of Organization
Non-Profit Education

Position Held
President

From (Mo., Yr.) 06/92 To (Mo., Yr.) Present

[Save] [Print Preview] [Add Another] [Delete] [Find] [Back] [Next]

Submit

CLOSE

Figure 7.2

Schedule D - Part II: Compensation in Excess of \$5,000 Paid by One Source

Steps:

- 12.** If you selected New Entrant or Nominee as the reporting status, or if you have no compensation to report in **Schedule D - Part II**, select **None**.
- 13.** If you have received compensation in excess of \$5,000 paid by one source to report, click **Next** (Figure 7.3).



If Incumbent or Termination Filer was selected in the reporting status, the OGE-278 Wizard will automatically populate the **None** check box.

Schedule D - Part II: Compensation in Excess of \$5,000 Paid by One Source Form Approved. OMB No. 3209-0001 www.cerenade.com

Guide

- Personal
- Schedule A
- Schedule B I
- Schedule B II
- Schedule C I
- Schedule C II
- Schedule D I
- Schedule D II**

Submit

CLOSE

ATTENTION -
Do not complete this part if you are an Incumbent, Termination Filer, or Vice Presidential or Presidential Candidate.

Report sources of more than \$5,000 compensation received by you or your business affiliation for services provided directly by you during any one year of the reporting period. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise, or any other non-profit organization when you directly provided the services generating a fee or payment of more than \$5,000. You need not report the U.S. Government as a source.

12

☒ None

13

[Save] [Print Preview] [Back] [Next]

Figure 7.3

To complete **Schedule D – Part II: Compensation in Excess of \$5,000 Paid by One Source**:

Steps:

- 14.** Type the name and address of the compensation source. Only 2 lines of text.
- 15.** Type a brief description of the duties for which you were compensated. Only 2 lines of text.
- 16.** The **Add Another** button allows you to add a new line item in each of the schedules.
- 17.** The **Delete** button allows you to delete the selected line item in each of the schedules.
- 18.** To randomly search, find and edit a line item, click the **Find** button.

The screenshot shows the 'Schedule D - Part II: Compensation in Excess of \$5,000 Paid by One Source' form. The sidebar on the left contains a 'Guide' section with links to 'Personal', 'Schedule A', 'Schedule B I', 'Schedule B II', 'Schedule C I', 'Schedule C II', 'Schedule D I', and 'Schedule D II'. The main content area is titled 'Identification of Compensation' and includes a sub-header '1 OF 1'. Below this, there is a prompt: '(Enter only two lines of text in the Organization, Type of Organization and Position Held fields)'. The form has two main input sections: 'Source (Name and Address)' and 'Brief Description of Duties'. The 'Source' section contains two text boxes with the text 'Doe Jones & Smith' and 'Hometown, State'. The 'Brief Description of Duties' section contains a text box with the text 'Legal Services'. The bottom navigation bar includes buttons for '[Save]', '[Print Preview]', '[Add Another]', '[Delete]', '[Find]', '[Back]', and '[Next]'. Yellow callout boxes are placed over the form: box 14 is over the 'Source' text boxes, box 15 is over the 'Brief Description of Duties' text box, box 16 is over the 'Add Another' button, box 17 is over the 'Delete' button, and box 18 is over the 'Find' button.

Figure 7.4

This is the end of the data entry for the OGE-278 Wizard. In the remaining chapters, you will learn how to save, print, and import your data.

If you need to save, see Chapter 8.

If you need to print, see Chapter 9.

If you need to import, see Chapter 10.

Chapter 8 Saving the OGE-278 in the Wizard

You can use the **Guide** to edit any of the sections by selecting the section.

It is recommended that you save often to avoid losing any of your data. You can **only** save the OGE-278 to your local computer. On every screen where data can be entered there is a **Save** button located on the bottom left. Saving your data is easy. It is similar to saving a document in Word.

To save the OGE-278:

Steps:

1. Click **Save** (Figure 8.1).

Schedule A - Assets and Income Form Approved OMB No. 3209-0001 www.cerenade.com

Asset and Income (Block A) 1 OF 1

Description **Fidelity Olympus Fund**
(2 lines of text only)

Skip Blocks "B" and "C" if this is a Sub-Category Item.

Valuation of Assets (Block B)

<input type="radio"/> None (or Less than \$1,001)	<input type="radio"/> \$100,001 - \$250,000	<input type="radio"/> \$1,000,001 - \$5,000,000	<input type="radio"/> Excepted Investment Fund ?
<input type="radio"/> \$1,001 - \$15,000	<input checked="" type="radio"/> \$250,001 - \$500,000	<input type="radio"/> \$5,000,001 - \$25,000,000	<input type="radio"/> Excepted Trust ?
<input type="radio"/> \$15,001 - \$50,000	<input type="radio"/> \$500,001 - \$1,000,000	<input type="radio"/> \$25,000,001 - \$50,000,000	<input type="radio"/> Qualified Trust ?
<input type="radio"/> \$50,001 - \$100,000	<input type="radio"/> Over \$1,000,000 *	<input type="radio"/> Over \$50,000,000	<input type="radio"/> Clear Above Selection

Income (Block C)

Type	Amount		
<input type="checkbox"/> Dividends	<input type="radio"/> None (or less than \$201)	<input type="radio"/> \$5,001 - \$15,000	<input type="radio"/> Over \$1,000,000 *
<input type="checkbox"/> Rent and Royalties	<input type="radio"/> \$201 - \$1,000	<input type="radio"/> \$15,001 - \$50,000	<input type="radio"/> \$1,000,001 - \$5,000,000
<input type="checkbox"/> Interest	<input type="radio"/> \$1,001 - \$2,500	<input type="radio"/> \$50,001 - \$100,000	<input type="radio"/> Over \$5,000,000
<input checked="" type="checkbox"/> Capital Gains	<input type="radio"/> \$2,501 - \$5,000	<input checked="" type="radio"/> \$100,001 - \$1,000,000	
<input type="checkbox"/> Other Income (Specify Type & Actual Amount)		Date Only if Honoraria (Mo., Day, Yr.)	10/12/2010

*Category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.

1

[Save] [Print Preview] [Add Another] [Delete] [Find] [Back] [Next]

Figure 8.1

2. The “Save Form Confirmation” dialog appears (Figure 8.2).

Schedule A - Assets and Income Form Approved, OMB No. 3209-0001
www.cerenade.com

Asset and Income (Block A) 1 OF 1

Description Fidelity Olympus Fund
(2 lines of text only)

Skip Blocks "B" and "C" if this is a Sub-Category Item.

Valuation of Assets (Block B)

☐ None (or Less) ☐ \$1 - \$5,000,000 ☐ Excepted Investment Fund (?)
☐ \$1,001 - \$15,000 ☐ \$1 - \$25,000,000 ☐ Excepted Trust (?)
☐ \$15,001 - \$50,000 ☐ \$101 - \$50,000,000 ☐ Qualified Trust (?)
☐ \$50,001 - \$100,000,000 ☐ Clear Above Selection

Income (Block C)

☐ Dividends ☐ \$15,001 - \$50,000 ☐ Over \$1,000,000 *
☐ Rent and Royalties ☐ \$15,001 - \$50,000 ☐ \$1,000,001 - \$5,000,000
☐ Interest ☐ \$1,001 - \$2,500 ☐ \$50,001 - \$100,000 ☐ Over \$5,000,000
☒ Capital Gains ☐ \$2,501 - \$5,000 ☐ \$100,001 - \$1,000,000
☐ Other Income (Specify Type & Actual Amount) Date Only if Honoraria (Mo., Day, Yr.) 10/12/2010

*This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.

[Save] [Print Preview] [Add Another] [Delete] [Find] [Back] [Next]

Figure 8.2

Click the 'Download' button to save your Form to your computer.

IMPORTANT: Make a note of the folder you select for downloading the Form as you will need it later in case you wish to reopen the downloaded Form using this application.

3. Your browser will give you a choice to Save or Open this Form (Figure 8.3)

IMPORTANT: Always select the “Save” option. Once the download is complete, click the 'Close' button to return to editing your Form.

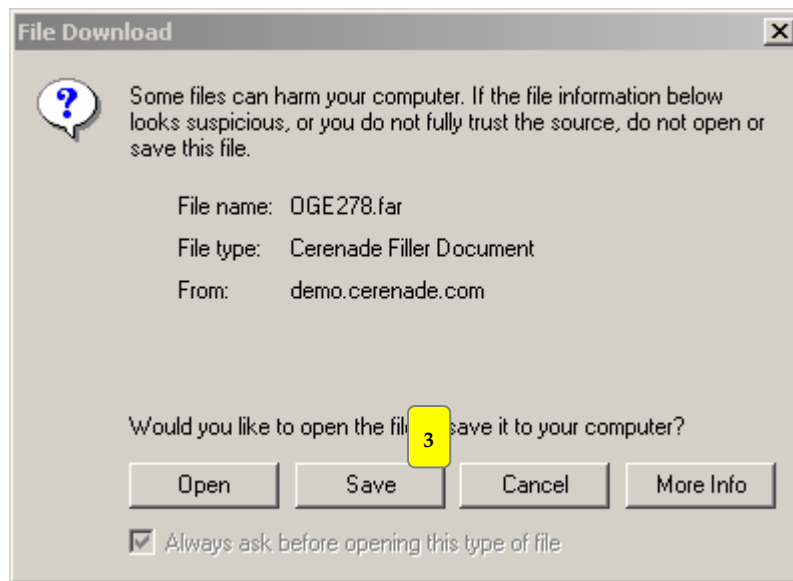


Figure 8.3

The **Save As** dialog box opens allowing you to choose a place to save your file.

The program will assign a random file name. For example, *OGE278.far*. It is recommended you change the file name so that it identifies the form followed by your name and year. For example, *OGE278_2011.far*. *FAR* is the extension name and must not be changed.

4. Edit the file name that appears (Figure 8.4).

Note: If you have previously saved the file, you can select it and overwrite it when asked.

5. Click **Save** to save the file to the place you have designated.

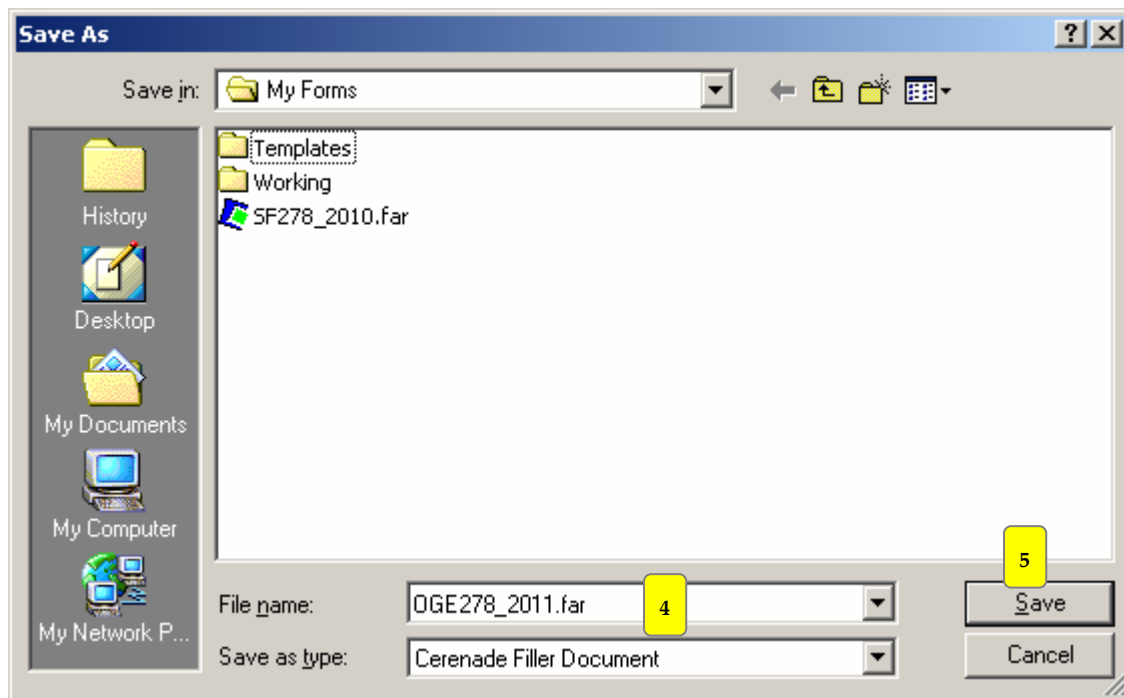


Figure 8.4

6. Click **Close** to return to the OGE-278 Wizard (Figure 8.5).

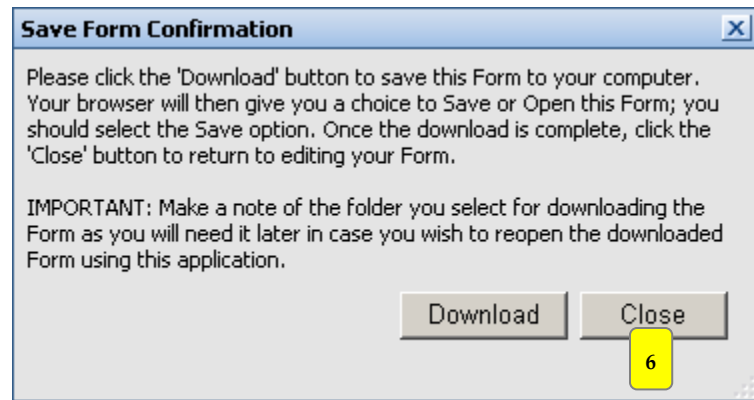


Figure 8.5

Chapter 9 Preview and Printing the OGE-278 in the Wizard

From any OGE-278 Wizard screen that has a **Print Preview** button located at the bottom of the screen, you can view your data in the actual form.

To preview and print your data:

Steps:

1. Click **Print Preview** (Figure 9.1).

Schedule A - Assets and Income Form Approved
OMB No. 3209-0001
www.cerenade.com

Asset and Income (Block A) 1 OF 1

Description: **Fidelity Olympus Fund**
(2 lines of text only)

Skip Blocks "B" and "C" if this is a Sub-Category Item.

Valuation of Assets (Block B)

<input type="radio"/> None (or Less than \$1,001)	<input type="radio"/> \$100,001 - \$250,000	<input type="radio"/> \$1,000,001 - \$5,000,000	<input type="radio"/> Excepted Investment Fund ?
<input type="radio"/> \$1,001 - \$15,000	<input type="radio"/> \$250,001 - \$500,000	<input type="radio"/> \$5,000,001 - \$25,000,000	<input type="radio"/> Excepted Trust ?
<input type="radio"/> \$15,001 - \$50,000	<input type="radio"/> \$500,001 - \$1,000,000	<input type="radio"/> \$25,000,001 - \$50,000,000	<input type="radio"/> Qualified Trust ?
<input type="radio"/> \$50,001 - \$100,000	<input type="radio"/> Over \$1,000,000 *	<input type="radio"/> Over \$50,000,000	<input type="radio"/> Clear Above Selection

Income (Block C)

Type	Amount
<input type="checkbox"/> Dividends	<input type="radio"/> None (or less than \$201) <input type="radio"/> \$5,001 - \$15,000 <input type="radio"/> Over \$1,000,000 *
<input type="checkbox"/> Rent and Royalties	<input type="radio"/> \$201 - \$1,000 <input type="radio"/> \$15,001 - \$50,000 <input type="radio"/> \$1,000,001 - \$5,000,000
<input type="checkbox"/> Interest	<input type="radio"/> \$1,001 - \$2,500 <input type="radio"/> \$50,001 - \$100,000 <input type="radio"/> Over \$5,000,000
<input checked="" type="checkbox"/> Capital Gains	<input type="radio"/> \$2,501 - \$5,000 <input type="radio"/> \$100,001 - \$1,000,000
<input type="checkbox"/> Other Income (Specify Type & Actual Amount)	Date Only if Honoraria (Mo., Day, Yr.) 10/12/2010

* This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held with the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.

1 [Save] [**Print Preview**] [Add Another] [Delete] [Find] [Back] [Next]

Figure 9.1

2. To return to the **Wizard**, click the **Close Preview** icon.
3. Navigate through the pages of OGE-278 form by using the green arrows buttons.
4. Click the **Print** icon (Figure 9.2).

Executive Branch Personnel PUBLIC FINANCIAL DISCLOSURE REPORT

Form Approved: OMB No. 3209 - 0001

Reporting Status (Check Appropriate Boxes): ☒ Incumbent, ☐ New Entrant, Nominee, or Candidate, ☐ Termination Filer

Calendar Year Covered by Report: 2010

Termination Date (if Applicable) (Month, Day, Year):

Reporting Individual's Name: Last Name: Doe, First Name and Middle Initial: Jane J

Position for Which Filing: Title of Position: Secretary, Department or Agency (if Applicable): U.S. Department of State

Location of Present Office (or forwarding address): Address (Number, Street, City, State, and ZIP Code): 555 Main Street, Washington, DC 23000, Telephone No. (Include Area Code): 202-555-5555

Position(s) Held with the Federal Government During the Preceding 12 Months (if Not Same as Above): Title of Position(s) and Date(s) Held: Executive Secretary 1/10 - 6/10

Presidential Nominee Subject to Senate Confirmation: Name of Congressional Committee Considering Nomination: Do You Intend to Create a Qualified Diversified Trust? ☒ Yes, ☐ No

Certification: Signature of Reporting Individual: Date (Month, Day, Year):

Other Review (if desired by agency): Signature of Other Reviewer: Date (Month, Day, Year):

Agency Ethics Official's Opinion: Signature of Designated Agency Ethics Official/ Reviewing Official: Date (Month, Day, Year):

Office of Government Ethics Use Only: Signature: Date (Month, Day, Year):

Comments of Reviewing Officials (if additional space is required, use the reverse side of this sheet):

Fee for Late Filing: Any individual who is required to file this report and does so more than 30 days after the date the report is required to be filed, or, if an extension is granted, more than 30 days after the last day of the filing extension period, shall be subject to a \$200 fee.

Reporting Periods: Incumbents: The reporting period is the preceding calendar year except Part II of Schedule C and Part I of Schedule D where you must also include the filing year up to the date you file. Part II of Schedule D is not applicable. Termination Filers: The reporting period begins at the end of the period covered by your previous filing and ends at the date of termination. Part II of Schedule D is not applicable.

Nominees, New Entrants and Candidates for President and Vice President: Schedule A -- The reporting period for income (BLOCK C) is the preceding calendar year and the current calendar year up to the date of filing. Value assets as of any date you choose that is within 31 days of date of filing. Schedule B -- Not applicable. Schedule C, Part I (Liabilities) -- The reporting period is the preceding calendar year and the current calendar year up to any date you choose that is within 31 days of the date of filing. Schedule C, Part II (Agreements or Arrangements) -- Show any agreements or arrangements as of the date of filing. Schedule D -- The reporting period is the preceding two calendar years and the current calendar year up to the date of filing.

Figure 9.2

The **Print Parameters** dialog box opens (Figure 9.3).

5. From the **Send Printout to**, select **Adobe PDF File**. Your other option is **Microsoft XPS File**.
6. You can select the page range if you want to print just selected pages.
For example, 1,3,5-12
7. From the **Print Mode**, make sure that **Form and Data** is selected. Your other option is **Form Only**.
8. To skip printing blank pages, check the **Skip Printing Pages with no Data** checkbox.
9. Click **Print**

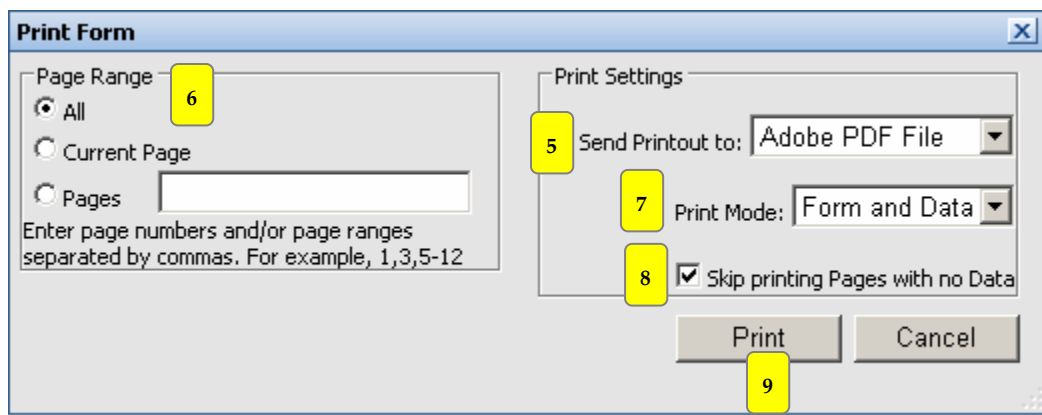


Figure 9.3

A new window opens displaying the PDF on your screen (Figure 9.4).

- 10.** Click the **Printer** icon to complete the print process

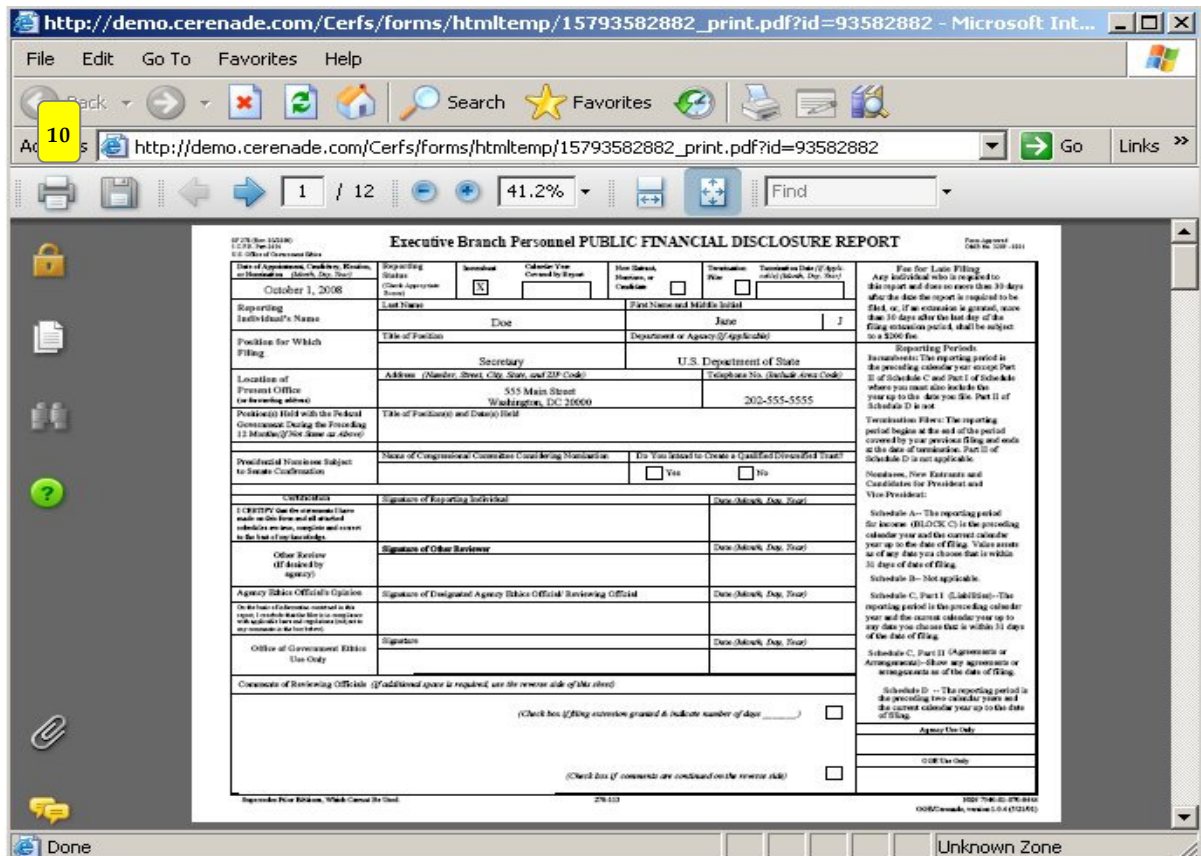


Figure 9.4

11. Click **OK** to print the OGE-278 (Figure 9.5).

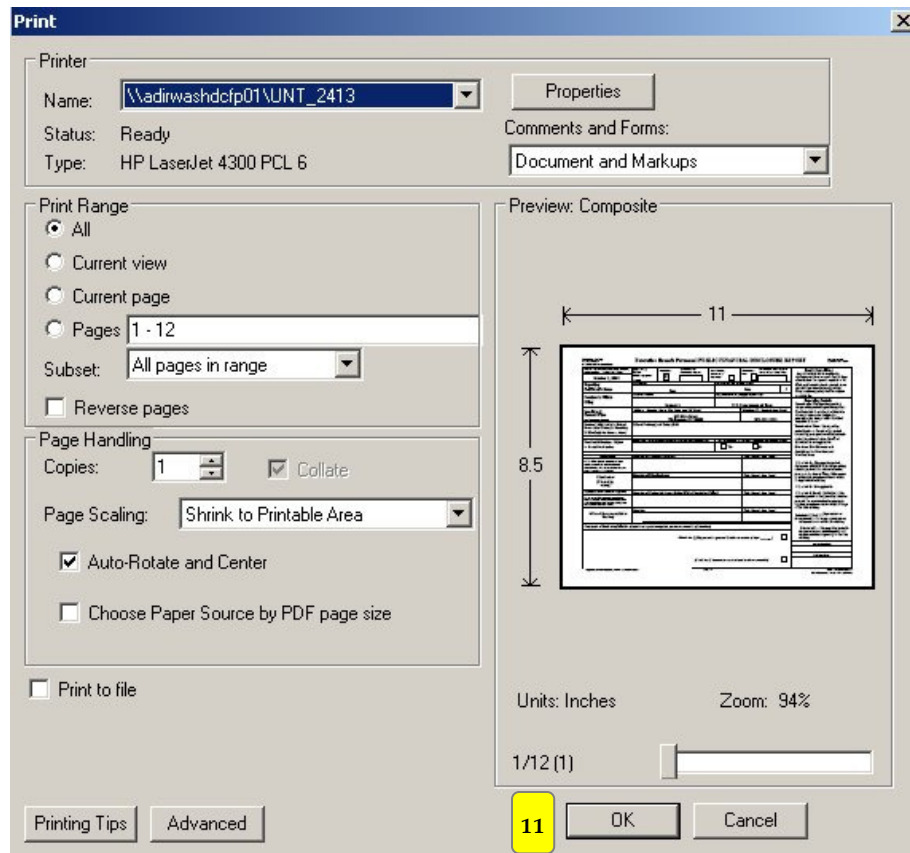


Figure 9.5

After your file prints, it will bring you back to the PDF File which you can close.

Chapter 10 Importing data into the Wizard

If you have existing data from a saved OGE-278 created in the Wizard, you can import your data back into the OGE-278 Wizard.

To import your data into the OGE-278 Wizard:

Steps:

1. From this **Guide** page in the Wizard, click **Import Data** (Figure 10.1).

Figure 10.1

2. Click **Browse** to edit your previously saved form (Figure 10.2).

OGE-278 Executive Branch Personnel Public Financial

Form Approved
OMB No. 3209-000
www.cerenade.com

Guide

- Personal
- Schedule A
- Schedule B I
- Schedule B II
- Schedule C I
- Schedule C II
- Schedule D I
- Schedule D II

Submit

CLOSE

OGE-278 Wizard
Use this option if you have not started the OGE-278 Wizard

Import Data
Use this option to upload your existing data from a saved OGE-278

Get Answers
Help on this Form
Privacy Act Statement

Getting Started
This site provides a secure environment for you to enter your data. Partially completed data will be saved automatically. If you need to stop for a moment, please click the "Save" button and save the data to your computer.

Open Form
Please click 'Browse...' to locate and select Form on your computer and then click 'Continue' to open it.

Browse... **2**

Continue **Cancel**

New Application / Import Data
Begin a new OGE-278 Wizard or import data that you previously saved during a prior session.

Comments, Questions?
Please send your comments or questions to Sarah Taylor at TaylorSE2@state.gov

Figure 10.2

The **Choose file** dialog box opens allowing you to use the **Look In** drop down box to choose the folder you saved your FAR file. The example in Figure 10.3 uses the **OGE278** folder.

3. Select the FAR file that you have named and click **Open**. This example uses **OGE278_2011.far**.

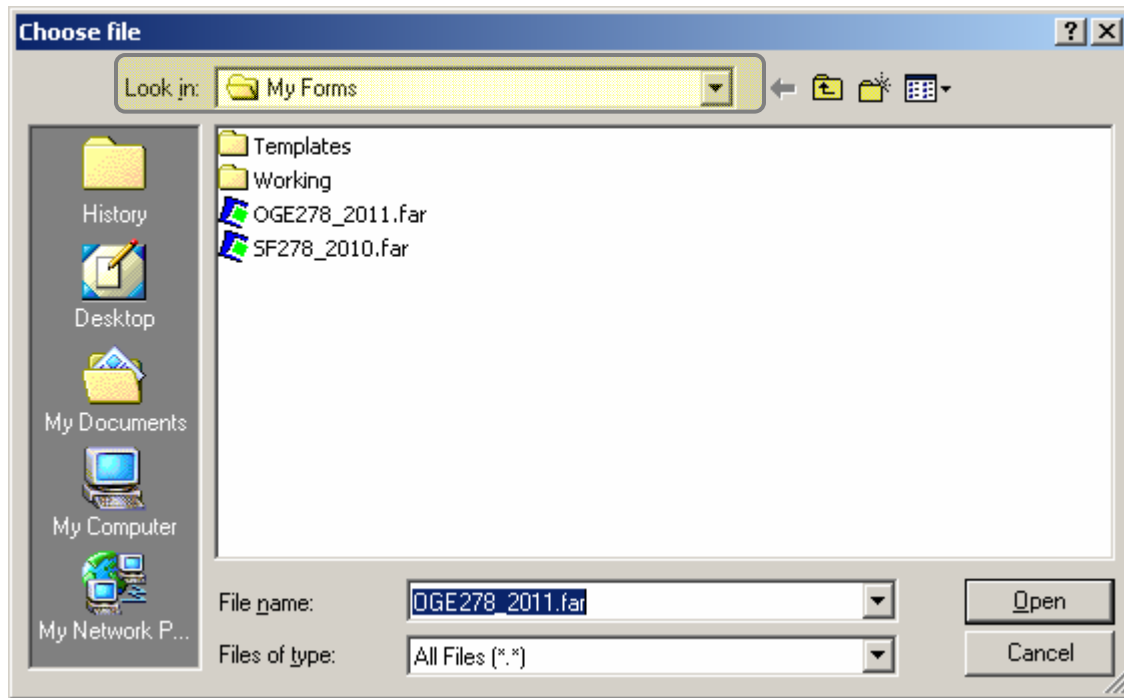


Figure 10.3

4. Click **Continue** to upload your data into the OGE-278 Wizard (Figure 10.4).

OGE-278 Executive Branch Personnel Public Financial

Form Approved
OMB No. 3209-0001
www.cerenade.com

Guide

- Personal
- Schedule A
- Schedule B I
- Schedule B II
- Schedule C I
- Schedule C II
- Schedule D I
- Schedule D II

Submit

CLOSE

OGE-278 Wizard
Use this option if you have not started the OGE-278 Wizard

Import Data
Use this option to upload your existing data from a saved OGE-278

Get Answers
Help on this Form
Privacy Act Statement

Getting Started
This site permits Partially complete If you need to q the data to your

New Application
Begin a new OGE-278 Wizard or import data that you previously saved during a prior session.

Comments, Questions?
Please send your comments or questions to Sarah Taylor at TaylorSE2@state.gov

Open Form
Please click 'Browse...' to locate and select Form on your computer and then click 'Continue' to open it.

ms\OGE278_2011.far **Browse...**

4 **Continue** **Cancel**

Figure 10.4

Chapter 11 Submitting the OGE-278 form to L/Ethics/FD

1. You can submit your completed OGE-278 form using the **Submit** button available on the Guide screen of the Wizard (Figure 11.1).

Schedule B - Part II: Gifts, Reimbursements, and Travel Expenses Form Approved OMB No. 3209-000 www.cerenade.com

Identification of Gift, Reimbursement or Travel Expense 1 OF 1

Source (Name and Address) *(Only 2 lines of text)*
Frank Jones, San Francisco, CA
(Personal Friend)

Brief Description *(Only 2 lines of text)*
A Leather Briefcase

Value
300.00

1 **Submit**

CLOSE

[Save] [Print Preview] [Add Another] [Delete] [Find] [Back] [Next]

Figure 11.1

2. Click **Preview** to review the final copy of your OGE-278 form.
3. Click **Submit** to send the final copy of your OGE-278 form to L/ETHICS/FD(Figure 11.2).

Figure 11.2

4. You will receive a notice upon successful transmission of your form (Figure 11.3).



Figure 11.3

5. Alternatively, you can save your OGE-278 file. Open your email program and start a new email message. Address the message to [L-SF-278 Reports](#) and attach your FAR file stored on your local computer. For example, *OGE278_2011.far*.

6. Currently, we do not have approval to accept electronically signed OGE-278 reports. Thus, we must receive a signed copy, even if you email the completed report to the L/ETHICS/FD office. You will need to also submit a signed copy by mail to:

L/Ethics/FD
2401 E Street NW
SA-1, Room H-228
Washington, DC 20522

Or

You can also fax a signed copy to:

Fax: (202) 663-3339